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OSIP Online Services Guide

Actuaries

11050 Olson Drive, Suite 230 | Rancho Cordova, CA 95670 | Phone (916) 464-7000 | Fax (916) 464-7007

E-Mail OSIP@dir.ca.gov | Website <http://www.dir.ca.gov/osip/>

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OSIP Online Services

Introduction

What is OSIP Online Services?

OSIP Online Services is the Office of Self Insurance Plans' newest service to facilitate Self Insurance Customers ability to easily fulfill their regulatory obligations more efficiently and effectively by enabling electronic processing.

Users can will file your Annual Report, select or change your actuary (one must be chosen in order to file the Actuarial Summary and Study), and soon file your Financial Statement.

What this guide will Cover:

Registering with The Office of Self Insurance Plans

Accessing the new OSIP Online Services

Logging Into OSIP Online for Actuaries

Navigation in OSIP Online

Submitting an Actuarial Summary and Study

Updating your Actuary Profile

OSIP Online Support

Registering with the Office of Self Insurance Plans

In order to access OSIP Online Services, you must first complete the New Actuary Registration online form.

Please e-mail OSIP@dir.ca.gov for the link to register.

After you submit your completed registration form to OSIP:

- 1) You will receive a confirmation e-mail of your registration with your User ID and Password to enable you to access OSIP Online.
- 2) Your name is placed on a listing that is made available to the various employers participating in the Self Insurance program with the State of California.

The screenshot shows the 'New Actuary Registration' form on the website of the State of California Department of Industrial Relations. The header includes the state logo, the department name, and navigation links like 'Home', 'Labor Law', 'Cal/OSHA - Safety & Health', 'Workers' Comp', 'Self Insurance', 'Apprenticeship', 'Director's Office', and 'Boards'. The form itself is titled 'New Actuary Registration' and includes an 'Instruction:' section with two bullet points: one indicating required information and another advising not to use the form for updates. The form fields are organized into several rows: 'First Name', 'Middle Initial', and 'Last Name'; 'Title' and 'Designation(s)' (with a dropdown); 'Phone Number', 'Primary E-mail', and 'Secondary E-mail'; 'Actuary Firm'; and 'Firm Location' which includes 'Street', 'City', 'State' (with a dropdown), and 'Zip code'. Below these fields is a scrollable area containing five numbered instructions regarding the actuarial study. At the bottom, there is a checkbox for certifying the statements under penalty of perjury, and two buttons labeled 'Submit' and 'Cancel'.

State of California
Department of Industrial Relations

Press Room | Contact DIR | CA.gov

Home | Labor Law | Cal/OSHA - Safety & Health | Workers' Comp | Self Insurance | Apprenticeship | Director's Office | Boards

New Actuary Registration

Instruction:

- * Indicates required information
- Do not use this form for updates. If your profile needs to be updated please email OSIP@dir.ca.gov or contact OSIP at (916) 484-7000

First Name * Middle Initial Last Name *

Title * Designation(s) *

Phone Number * Primary E-mail * Secondary E-mail

Actuary Firm *

Firm Location

Street * City * State * Zip code *

Select State

1. The actuarial study clearly identifies any excess coverage by carrier, policy year and self-insured retention, by year, as required by §15209 (d).

2. The actuary preparing the attached actuarial study understands that the study may be used by the State of California and the Self Insurers' Security Fund to set appropriate collateral and deposit amounts, and for any other regulatory purpose under the regulations, as required by §15209(e).

3. All liabilities in this study and summary are for California claims only; §15209(g).

4. The actuary/firm preparing this report maintains a minimum of \$1,000,000 professional liability and errors and omissions coverage. §15209 (a)(3).

5. I/my firm are independent from the subject firm of this study/summary.

☐ I certify under penalty of perjury, the above statements to be true and correct.

Submit Cancel

Accessing the new OSIP Online Services Page

OSIP Online Services can be accessed from the OSIP home page by clicking on the OSIP Online Service button near the middle of the home page, or by selecting the OSIP Online Services link in the Quick Links section on the right side of the page.

Please note: the previous Annual Report Quick Link has been removed

Press Room | Contact DIR | CA.gov

Search

• This Site • California

Home Labor Law Cal/OSHA - Safety & Health Workers' Comp Self Insurance Apprenticeship Director's Office Boards

Boards, Commissions & Programs

Office of Self Insurance Plans (OSIP)

The Office of Self Insurance Plans (OSIP) is a program within the director's office of the Department of Industrial Relations (DIR) responsible for the oversight and regulation of workers' compensation self insurance within California. OSIP is also responsible for establishing and insuring that required security deposits are posted by self insurers in amounts sufficient to collateralize against potential defaults by self insured employers and groups.

About OSIP

Self Insured Employers

Self Insurance Groups (SIG)

Third Party Administrator (TPA)

Public Entities and Joint Power Authorities (JPA)

Forms, Publications and Reports

Laws & Regulations

Payments - Invoices

Contact OSIP

Archives

Glossary

OSIP Online Services

Click on the OSIP Online button to log in and submit your filing requirement.

[Go to OSIP Online »](#)

Self Insurance by the Numbers - 2013 Annual Report Statistics

\$177 Billion total self-insured payroll
4 Million CA Workers covered by self-insurance
1 in 4 CA Workers is covered by self-insurance
9,849 CA Employers are active self-insurers

OSIP - AUDIT UNIT

Office of Self Insurance Plans (OSIP)

Quick Links

- [OSIP Online Services](#)
- [Make a Payment](#)
- [Get information about self insurance and the requirements to self insure](#)
- [Apply to take the Self Insurance Administrator's examination](#)
- [Determine if an employer is self insured](#)
- [Determine if a person is a self insured administrator](#)

Related Links

- [Self-Insurers' Security Fund](#)
- [California Self Insurers' Association](#)
- [Self Insurance Institute of America](#)
- [California WC & Risk Conference](#)

About OSIP

- [About Us](#)
- [Contact](#)
- [OSIP site map](#)

OSIP Home

Logging into OSIP Online for Actuaries

OSIP Online Services page: <https://efiling.dir.ca.gov/OSIPO/>

First Time and Returning Users: Enter your User ID and Password

New Actuaries: Who are not yet registered with the Office of Self Insurance Plans, please e-mail OSIP@dir.ca.gov

If you have forgot your User ID and/or Password: Please e-mail OSIP@dir.ca.gov

Minimum system requirements: Internet Explorer (8 or higher), Chrome, Firefox, and Safari will allow full functionality of OSIP Online Services.

State of California
Department of Industrial Relations

Press Room | Contact DIR | CA.gov

Home | Labor Law | Cal/OSHA - Safety & Health | Workers' Comp | Self Insurance | Apprenticeship | Director's Office | Boards

Welcome to OSIP Online Services Exit

Thank you for visiting OSIP Online Services, the Office of Self Insurance Plans online tool. OSIP Online allows Self Insured Employers, Actuaries, Third Party Administrators and Group Administrators to file and submit their required documents online.

First time users, please email OSIP@dir.ca.gov to receive a login user ID and password, or call OSIP at (916) 464-7000.

For Annual Report users, you can optionally click this link for [direct access to Annual Report](#).

OSIP Online system requirements are: Internet Explorer (10 or higher), Chrome, and Firefox

[Self-insurance Regulations](#)

[FAQs or online assistance instructions link](#)

User ID

Password

Login

Forgotten your Password? For the Annual Report, click [here](#). For all others, email OSIP@dir.ca.gov

Annual Due Dates

	Private Employers	Self Insured Groups	Public Employers/ Joint Power Authorities
Annual Report	March 1 st	March 1 st	October 1 st
Actuarial Summary & Study	May 1 st	April 15 th	-
Financial Statement	Annually	March 1 st * / July 1 st	-
Core Member Financials	-	Annually	-

* Unaudited

Navigation in OSIP Online

Once logged in, the Actuary Menu will be displayed with your navigation options for tasks you wish to complete. Currently for Actuaries, the “Actuarial Summary and Study” submission, and “Update My Profile” actions are active.

When you have been selected by an employer(s) in OSIP Online, you will receive an email notifying you of your selection(s). This allows OSIP Online to enable you to submit an Actuarial Summary and Study on the employer’s behalf and update your Actuary profile. To submit an Actuarial Summary and Study or update your profile, click on the appropriate button.



Please note: a new feature for de-selecting an employer will be available soon. Until then, please email OSIP@dir.ca.gov

Submitting an Actuarial Summary & Study

The screenshot shows the 'Filing Actuarial Summary and Study Package' form on the State of California Department of Industrial Relations website. The form includes sections for Employer information, Liabilities (Net, Ceded, Gross), a certification statement, and Actuary details. Numbered annotations (1-6) point to specific parts of the form: 1) Employer selection dropdown, 2) Liabilities input fields, 3) Upload File button, 4) Certification statement checkbox, 5) Actuary information fields, and 6) Print/Submit/Cancel buttons.

After the page refreshes, you will be on the “Filing Actuarial Summary and Study Package” form

1) From the pull down menu of Employers, select the employer you want to complete the submission for. After selection, the Certificate #, contact person, phone and email address of the employer selected will be displayed.

2) Complete the Net and Ceded Liabilities sections, and the Gross Liabilities will calculate the total. If you hover over the “?”, you will be provided a definition for each individual item.

3) Attach your study information by selecting the upload file button. Please note: The maximum file size that may be attached is 12mb. If your file is larger than this, please e-mail OSIP@dir.ca.gov

4) Scroll through the certification statements and check the “I certify...” box confirmation to proceed.

5) Your actuarial information will be populated based on your login and registration profile data. Please confirm it is accurate. If not, please e-mail OSIP@dir.ca.gov

6) Print/Select/Cancel buttons:

The **Print** button will only print the form itself, not the attachment.

The **Submit** button will send the information from the form and your attachment to OSIP. You will then see a confirmation screen, as well as receive a confirmation email with a copy of the completed form and your file. The employer will also receive a copy of the email.

The **Cancel** button will take you back to the Actuary Menu page.

Please note:

- Information input in the form **cannot** be saved
- To Amend an Actuarial Summary & Study, please email OSIP@dir.ca.gov

Update My Profile

The form will pre-populate with the most current information provided to OSIP.

Update any fields that need to be changed.

Note: By updating your information, (ex: changing your Actuarial Firm) it does not notify any of your client employers. It only updates your records with OSIP.

The **Submit** button will update the information from the form with OSIP's systems. You will then see a confirmation screen, as well as receive a confirmation email regarding your updates.

The screenshot shows the 'Actuary Profile Update' form on the State of California Department of Industrial Relations website. The header includes the CA.GOV logo, the department name, and navigation links for Press Room, Contact DIR, and CA.gov. A secondary navigation bar lists Home, Labor Law, Cal/OSHA - Safety & Health, Workers' Comp, Self Insurance, Apprenticeship, Director's Office, and Boards.

The form title is 'Actuary Profile Update' with a play button icon. A 'Logout' button is in the top right. An 'Instruction:' section states that an asterisk (*) indicates required information.

The form fields are as follows:


- First Name *, Middle Initial, Last Name *
- Title *, Designation(s) *
- Phone Number *, Primary E-mail *, Secondary E-mail
- Actuarial Firm Name *
- Firm Location: Street *, City *, State *, Zip code *

Below the fields is a scrollable area containing five numbered statements for certification:

1. The actuarial study clearly identifies any excess coverage by carrier, policy year and self-insured retention, by year, as required by §15209 (d).
2. The actuary preparing the attached actuarial study understands that the study may be used by the State of California and the Self Insurers' Security Fund to set appropriate collateral and deposit amounts, and for any other regulatory purpose under the regulations, as required by §15209(e).
3. All liabilities in this study and summary are for California claims only, §15209(g).
4. The actuary/firm preparing this report maintains a minimum of \$1,000,000 professional liability and errors and omissions coverage. §15209 (a)(3)
5. I/my firm are independent from the subject firm of this study/summary.

At the bottom, there is a checkbox with an asterisk (*) and the text 'I certify the above statements to be true and correct.' Below this are 'Submit' and 'Cancel' buttons.

OSIP Online Support

1) Within OSIP Online itself, there are descriptions associated with each button in the menu screen, and at the top of each form are additional instruction comments. On some screens there are  icons, place your mouse pointer on these and “hover” and additional information will be displayed.

2) User guides are available at:

<https://efiling.dir.ca.gov/OSIPO/>

3) OSIP collection of Frequently Asked Questions (FAQs):

<http://www.dir.ca.gov/osip/OSIP-FAQ.htm>

4) Contact OSIP via email:

OSIP@dir.ca.gov

5) Contact OSIP via telephone:

(916) 464-7000